So Why Is the Fisherman Here with We Farmers?

Global Seafood Markets

April 2017
So Why Is the Fisherman Here with Us Farmers?
My Early Farming Experiences …. Poddy Lamb

Daily chasing, catching, and feeding poddy lamb
(Connemara Ireland 1974)
So Why Is the Fisherman Here with Us Farmers?
My Early Farming Experiences …. Annie Kerrigan

“Guiding Hand” of a Strong Irish Woman Farmer
Seafood Opportunities and Challenges
Agenda/discussion points

➢ So who is the National Fisheries Institute
➢ Harvesting a fish
➢ Getting a fish to market
➢ Selling a fish
What Is a Lobbyist?

1. Take our piece of paper and pen or pencil

2. In the next 7 seconds draw ……

3. …… a lobbyist

4. Share the picture with your table mates
What Is a Lobbyist?
All depends on your viewpoint
National Fisheries Institute
Who we are

- Voice for seafood community in Congress, White House, regulatory agencies, with the media, before the Court, in source countries, and in the marketplace
- Represent industry from “water to table”
- Committed to economic sustainable use of resources
- Operate globally
- Rely heavily on research to determine with whom and how best to communicate
National Fisheries Institute

Issues are our products

Solve problems in source countries

Resources

Legislative

Regulatory

Communications
- Media
- Consumer Outreach

Litigation

Time
### National Fisheries Institute

**Where we spend our resources** *(time, staff, outside services)*

<table>
<thead>
<tr>
<th></th>
<th>Legislative</th>
<th>Regulatory</th>
<th>Comms</th>
<th>Courts</th>
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</thead>
<tbody>
<tr>
<td><strong>Health benefits</strong></td>
<td>Low</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td><strong>Aquaculture</strong></td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td><strong>Trade</strong></td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td><strong>Sustainability</strong></td>
<td>Medium</td>
<td>Low</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td><strong>Economic integrity</strong></td>
<td>Low</td>
<td>High</td>
<td>High</td>
<td>Low</td>
</tr>
</tbody>
</table>
National Fisheries Institute
Our View of Lobbying: Be Organized and Be Serious

“Ten people who speak make more noise than ten thousand who are silent.”

“The right to be heard does not automatically include the right to be taken seriously.”
So Let’s Bring a Fish to Market
Global Seafood Markets
Catching Our Fish: Two Methods of Production

World’s most dangerous job

Future of seafood industry
Global Seafood Markets
Catching Our Fish: Methods of Production

World capture fisheries and aquaculture production

- Capture production
- Aquaculture production
Global Seafood Markets
Catching Our Fish: Methods of Production

Global capture fisheries and aquaculture production, 1990–2030

- Aquaculture for human consumption
- Total capture fisheries
- Capture fisheries for human consumption

NOTE: Excludes aquatic mammals, crocodiles, alligators and caimans, seaweeds and other aquatic plants
Global Seafood Markets
Catching Our Fish: Sustainability Issues – Difficult Chart

Global trends in the state of the world’s marine fish stocks, 1974-2015

- Overfished
- Maximally sustainably fished
- Underfished

Source: FAO SOFIA 2018
Global Seafood Markets
Catching Our Fish: Sustainability Issues – Perspectives Matter

1. Take our piece of paper and pen or pencil

2. In the next 5 seconds draw …..

3. ….. a map of the United States

4. Share the map with your table mates
Global Seafood Markets
Catching Our Fish: Sustainability Issues – Perspectives Matter

If from Boston

If from Texas

If from Alaska
Global Seafood Markets
Catching Our Fish: Sustainability Issues – Perspectives Matter

Both are important, but Mexican papaya farmer does not feed the same number of people that an Australian beef rancher does ... so how things are measured and communicated matters enormously.

0.95 MT

versus

2,280,000 MT
The UN Food and Agriculture Organization reported today that **90% of the globe’s fisheries remain overfished or cannot support additional fishing pressure**. They further stated that only 1 in 10 fisheries are underused. Joe Activist warned the report is a “caution to us all that we cannot fish at this level and expect our grandchildren to eat.”

## Scientists report on fishery “stocks”

<table>
<thead>
<tr>
<th>Fishery</th>
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<th>Status</th>
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<tbody>
<tr>
<td>Stock A</td>
<td>10,000</td>
<td>Underfished</td>
</tr>
<tr>
<td>Stock B</td>
<td>1,000,000</td>
<td>MSY</td>
</tr>
<tr>
<td>Stock C</td>
<td>550,000</td>
<td>MSY</td>
</tr>
<tr>
<td>Stock D</td>
<td>125,000</td>
<td>Overfished</td>
</tr>
<tr>
<td>Stock E</td>
<td>50,000</td>
<td>MSY</td>
</tr>
<tr>
<td>Stock F</td>
<td>280,000</td>
<td>MSY</td>
</tr>
<tr>
<td>Stock G</td>
<td>90,000</td>
<td>MSY</td>
</tr>
<tr>
<td>Stock H</td>
<td>35,000</td>
<td>Overfished</td>
</tr>
<tr>
<td>Stock I</td>
<td>20,000</td>
<td>Overfished</td>
</tr>
<tr>
<td>Stock J</td>
<td>65,000</td>
<td>MSY</td>
</tr>
<tr>
<td></td>
<td>2,225,000</td>
<td></td>
</tr>
</tbody>
</table>

**MSY = Maximum Sustainable Yield**
Global Seafood Markets
Catching Our Fish: Sustainability Issues

The UN Food and Agriculture Organization reported today that the fisheries that produce 91% of the world’s seafood are managed sustainably. Mr. Jonathan Wilkinson, Canada’s Minister of Fisheries, celebrated the news, commenting, “We have been good stewards of our fisheries for decades. We are proud that we will provide healthy food to Canadian and the world’s families for centuries.”

Shift from scientists’ technical language to concepts your aunt understands
Global Seafood Markets
Bringing Our Fish to Market

International Trade in Protein (% of value)

Seafood is by far the most traded of the food commodities

Source: FAO FI
Global Seafood Markets
Bringing Our Fish to Market

Source: FAO SOFIA 2016

Which countries are the major marine capture fisheries producers?
1. China
2. Indonesia
3. United States of America
4. Russian Federation
5. Japan

Which countries are the major aquaculture producers?
1. China
2. India
3. Viet Nam
4. Bangladesh
5. Egypt

Major importers of fish and fishery products:
1. United States of America
2. Japan
3. China
4. Spain
5. France

Major exporters of fish and fishery products:
1. China
2. Norway
3. Viet Nam
4. Thailand
5. United States of America
Global Seafood Markets
Bringing Our Fish to Market

Seafood, the most traded protein globally
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Bringing Our Fish to Market: Current US Trade Policies

President Trump trade policies impacting farmers and fishers

Coalition of farmers (and others working behind the farmers) has challenged President Trump to deliver on promise

In seafood, US has 0% or *de minimus* tariffs, but face 25-40% tariffs in export markets
Global Seafood Markets
Selling Our Fish: Meat per Capita Consumption

Source: Our World in Data
Global Seafood Markets
Selling Our Fish: Types of Fish in North America

- Shrimp
- Salmon
- Canned tuna
- Tilapia
- Pollock
- Pangasius
- Cod
- Crab
- Catfish
- Clams
Global Seafood Markets
Selling Our Fish: North American Forms and Channels

In Restaurants
At Home

Fresh
Frozen
Shelf Stable
“Shift to eating seafood at least two times each week by swapping in fish for meat and poultry.”

Dietary Guidelines for Americans
Global Seafood Markets
Selling Our Fish: Building Coalitions with Third Parties and Social Media
Global Seafood Markets
Selling Our Fish: Seafood as an Experience, not a Medicine

“You don’t have to be Italian to enjoy the gastronomic and traditional Feast of the Seven Fishes…”
Global Seafood Markets
Selling Our Fish: Engaging Consumers with Facts

Kathy Hawthorn We've seen horrible pictures of farmed tilapia we stopped buying it. Can we buy tilapia not raised under those conditions?
Like · Reply · 1 · January 3 at 9:37pm

Clyde S. Gorsuch I feel the same way about tilapia or for that matter, any seafood from SE Asia.
Like · Reply · January 4 at 8:47am

Dish on Fish Hi Kathy, thank you for being a fan of Dish on Fish. Rest assured tilapia is a safe and healthy fish that is one of the most popular on American dinner plates. Unfortunately there have been more than a few misleading stories circulating about its whole... See More
Like · Reply · January 4 at 11:07am

Kathy Hawthorn Thank you guess we should reconsider. We did like this fish alot.
Like · Reply · 1 · January 4 at 11:53am
Global Seafood Markets
Selling Our Fish: Engaging Associations to Fight Back

Trade associations can be more aggressive with media, as they do not have consumer brands to protect …. allowing you to remain “above the fray.”

Goal is not to correct the immediate story, as much as to discipline the reporter and editor to never again publish a negative story about the seafood community (if facts are wrong)
Global Seafood Markets

Selling Our Fish: Speak to My Wife, not Another Farmer

“Margaret, that 0.0001134% of a metric ton of fish was delicious”

New Zealand fishing harvests 659,552,000 kg of fish
At 40% yield, results in 263,820,800 kg of fish as food

New Zealand fishing provides 2,326,503,113 meals to families each year

We eat meals, not metric tonnes

We are in the food business, not extractives business
Hello. My name is Heleen Lansink-Marissen and my family runs a dairy farm in Haaksbergen. We provide Dutch families about 3 1/2 million glasses of milk each year.
So Why Is the Fisherman Here with Us Farmers?
Cassandra’s Story of the Farmer and Fisherman

We, better than nearly all others, know the value of wise and sustainable use of resources to feed our families and billions of others.

We need to tell those stories.
So Why Is the Fisherman Here with We Farmers?

John Connelly
jconnelly@nfi.org
Global Seafood Markets
Catching Our Fish: Comparative Sustainability of Proteins

(a) MJ

(b) CO₂-eq

(c) PO₄-eq

(d) SO₂-eq